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ABSTRACT

This report focuses on trade unions in Britain as negotiators for and providers of education and training, either alone or in partnership with employers and educational institutions. Section 1 introduces the report's aims. Section 2 gives an overview of union involvement in education and training. It also introduces the tensions within current union approaches to education and training that reflect uncertainties in both workplace education and training and in plans for the University for Industry (UfI) initiative. Section 3 explains the rationale behind UfI, takes an inclusive view of UfI, summarizes the contents of the UfI prospectus, and explains how information and technologies can encourage and inhibit participation in lifelong learning. Section 4 looks at recent experiences of the Trades Union Congress and individual unions in negotiating for skills development in the workplace. It suggests how these can form a springboard from which unions can inform, influence, and contribute to the development of UfI. The section considers the following: different aspects of the skills agenda; motivation, guidance, and learning; negotiating for learning in the context of changing working practices; and priorities for trade unions. Section 5 looks at unions as providers of lifelong learning opportunities. Section 6 develops proposals for specific trade union roles within the UfI concept. Appendixes contain 18 references and resources and a glossary. (YLB)

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ED 429 203

Learning

Opportunities for Trade Unions and the University for Industry

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John Payne and Alastair Thomson

NIACE
THE NATIONAL ORGANISATION FOR ADULT LEARNING

TUC

D/EE
Department for Education and Employment

U.S. DEPARTMENT OF EDUCATION
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Partnerships for Learning

Opportunities for Trade Unions and the University for Industry

John Payne and Alastair Thomson

NIACE
THE NATIONAL ORGANISATION FOR ADULT LEARNING

TUC

D/EE
Department for Education and Employment

Published by the National Institute of
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NIACE, the national organisation for adult learning, has a broad remit to promote lifelong learning opportunities for adults. NIACE works to develop increased participation in education and training, particularly for those who do not have easy access because of barriers of class, gender, age, race, language and culture, learning difficulties and disabilities, or insufficient financial resources.

NIACE's website on the internet is http://www.niace.org.uk

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Foreword

No one knows the importance of lifelong learning better than trade unions. The radical transformation of Britain's industrial landscape has brought union members new opportunities and new insecurities. We have witnessed the decline of Britain's strong manufacturing base, the rapid expansion of jobs in the service sector, and the spread of new forms of so-called 'flexible' work.

Lifelong learning is one response to these challenges. Companies that are committed to high skill strategies and invest in the training of their workers are the best placed to cope with new technology and the global marketplace. People who carry on studying and training after school are likely to earn more and to be more secure in their jobs.

The University for Industry offers an exciting and innovative response to all those who want to learn. It will offer a one-stop shop for education and training. It will exploit the convergence of new technology to bring information and courses directly into people's homes and workplaces. It has the potential to stimulate a vast new appetite for learning, and create thousands of new learners who are given the support and confidence to continue learning throughout life.

Trade unions will have an important role in contributing to its success. The University for Industry must not be another scheme for the 'haves'. It must revolutionise access to learning for the 'have-nots' – those workers whose lack of qualifications and educational experience condemns them to a cycle of low pay, low skill, and insecure jobs.

Bridging the learning divide has always been at the centre of the trade union vision. Last century, we set up mechanics institutes to help workers and their families escape poverty through education. Today, our role is as ambassadors, promoters and negotiators of learning.

This report shows how many trade unions are already working with employers to turn workplaces into 'learning organisations'. We hope that all trade unions and policy makers will read this report, and consider how unions can use their experience to ensure that the University for Industry fulfils its vision of strengthening communities, families and individuals through learning.

John Monks
TUC General Secretary

Introduction

This report has a number of purposes. It outlines the aims and structure of the government's University for Industry (Ufl) initiative as known at May 1998. It also reviews the potential for trade unions to become active players in the development of Ufl, using the results of a consultative survey carried out by National Institute of Adult Continuing Education (NIACE) on behalf of the Trades Union Congress (TUC) and Department for Education and Employment (DfEE) during the winter of 1997/98. In particular, the report focuses on:

1. Trade unions as negotiators for education and training, and
2. Trade unions as providers of education and training, either alone or in partnership with employers and educational institutions.

Case-studies are provided of trade union activities in the education and training field which can inform union thinking about Ufl and offer practical insights into how trade unions can "make a difference" on behalf of their members in a world of rapidly changing skill requirements. The report makes specific proposals for trade union involvement in Ufl, building on the views of senior officials within the movement, and on the initial work of the TUC Learning Services Task Group.

The report is intended for: education and policy officers in unions; college, adult education and university staff working with employers and trade unions; research and policy staff in the public sector and in independent think tanks; training officers in both the public and private sector; government, business and trade union organisations responsible for policies and practice in this area.

The aims of the report are to:

- present project findings (mainly based on interviews and visits);
- raise awareness within trade unions about Ufl;
- raise awareness among other Ufl stakeholders of trade union initiatives and experience relevant to Ufl;
- make specific proposals for trade union contributions to Ufl.

Section 2 of the report gives an overview of union involvement in education and training and Section 3 explains the current state-of-play with regard to Ufl proposals. Section 4 looks at the recent experiences of the TUC and individual unions in negotiating for skills development in the

workplace. Section 5 looks at unions as providers of lifelong learning opportunities. In both these sections the focus is on specific experiences which are relevant to UfI development. Section 6 draws the whole field together and develops a number of proposals for specific trade union roles within the University for Industry concept.

While the project was carried out by NIACE on behalf of the TUC and DfEE, this report was drafted primarily by John Payne, a NIACE research associate, and Alastair Thomson of NIACE. Their views do not necessarily represent the corporate views of NIACE, the DfEE or of the TUC.

Trade unions, education and training

2

A changing picture

Trade unions were established to uphold the rights of workers, and to obtain improved wages and working conditions for them. For more than 100 years these have remained the primary concerns of unions but there has also been a consistent interest in education and training, which has taken a number of forms:

1. In skilled occupations, arrangements for apprenticeships traditionally involved trade unions in supervising the arrangements by which young workers learned a trade.
2. Trade unions and the TUC have provided training for active members taking on representative roles within the union, in conjunction with trade union study centres in colleges and universities.
3. Trade unions have worked with organisations such as the Workers' Educational Association and university extra-mural departments to provide extensive opportunities for their members to pursue their own education.
4. Trade unions and the TUC have argued publicly for expanded education and training opportunities for working people and their families, both in initial education and in post-compulsory education and training.

The strength of the trade union movement's contribution to the development of lifelong learning is understood and recognised by the government in its recent green paper on lifelong learning:

> *"We are fortunate in this country to have a great tradition of learning. We have inherited the legacy of the great self-help movements of the Victorian industrial communities. Men and women, frequently living in desperate poverty, were determined to improve themselves and their families. They did so through the creation of libraries, study at workers' institutes, through the pioneering efforts of the early trade unions, at evening classes, through public lectures and by correspondence courses. Learning enriched their lives and they, in turn, enriched the whole of society"*
> Rt. Hon David Blunkett MP, foreword to *The Learning Age* (Cm3790), London, The Stationery Office, February 1998.

3

During the last twenty years, changes in the labour market and in political life have led to a thorough re-think of how this tradition can be re-invigorated.

1. During the recessions of the early 1980s and 1990s, the traditional apprenticeship ceased to be a major form of entry to work (its spread had never, of course, been comprehensive within the labour market). The concept of acquiring skills which would last through a working lifetime disappeared. Instead, skills were acquired at college or through on-the-job training schemes, while workers who were made redundant struggled to acquire skills for new jobs in a series of less-than-satisfactory government training schemes.
2. Activist training continued to be provided through TUC courses at local colleges and through individual unions, some of which had established residential colleges for this purpose. There was a reduction in longer day-release courses and an increasing number of short, intensive courses.
3. Trade union visibility in the programmes of WEA and the extra-mural departments declined. Increasingly trade unions turned to initiatives developed in partnership with employers (such as Ford UK's Employee Development and Assistance Programme, called Ford EDAP) or schemes they controlled themselves (such as UNISON's Return to Learn) in order to make provision for the broader education of their members.
4. Recognising the importance of continued education and training for improved job security and wage levels, trade unions became increasingly involved in negotiating with employers for better training provision.
5. Trade unions became involved in a complex series of arguments about the links between national prosperity and education and training, and how workforce skills could be increased to meet international competitiveness, the business needs of employers and the personal development needs of their members. This is expanded upon below.

Whose responsibility is it to educate and train the workforce?

A key concern of the trade union movement in relation to lifelong learning is over the question of how workplace training is organised and funded. In the 1960s, a "levy/grant" system operated: 24 statutory "Industry Training Boards" were empowered to raise a levy within their defined sector from firms which did not provide training to a specified industrial standard and to give grants towards the cost of further education and training for companies which did train.

This system was radically altered in the 1970s and largely dismantled during the 1980s. It was replaced by a voluntary system led by employers in each sector. Not only were these new "Industry Training Organisations" (ITOs) under no obligation to include representatives of

relevant unions; they also left each employer to make its own decision, based on perceived business interest, about whether and how much to train. The development of large numbers of ITOs of variable quality and competence, combined with a parallel but overlapping structure of "Industry Lead Bodies" set up to develop occupational standards for National Vocational Qualifications, led to a recognition that "market forces" on their own were not working. From 1996, government took the decision to rationalise arrangements and encourage the establishment of larger, stronger and more strategic "National Training Organisations" (NTOs). While these still operate under the voluntary principle and are employer-dominated bodies, there are examples of unions playing an active role on NTO boards, for example the contribution of BECTU to the media industry NTO Skillset, described in Section 4.

The distinction between "good" organisations which train and "bad" organisations which do not is often over simplistic, with many shades of grey. Additionally, firms which do less training fall into a number of different problem categories:

- Firms confident that they can buy in skilled workers from outside, from colleges, training schemes or by "poaching" from competitors (*the attitude problem*);
- Firms where profit margins are too low to justify expenditure on training, for example businesses locked into a low wage : low skill equilibrium and competing on low price rather than high value added (*the financial problem*);
- Small and medium-sized firms (SMEs) which do not have a history of training and which typically do not have a dedicated training officer (*the know-how problem*);
- Small firms where it will always be difficult for firms to release staff from immediate job requirements (*the operational problem*).

While the attitude problem is endemic, the financial problem has been exacerbated by pressures on public bodies and others to accept lowest bids for contracted services with insufficient consideration given to quality. In relation to know-how and operational problems, the restructuring of the UK economy means that there are far more firms in the small category than 20 years ago. Innovative approaches are needed to encourage them to train.

The approach, inherited from the previous government and dominant in the green paper *The Learning Age* (Department for Education and Employment, 1998a), attempts to construct a market in workplace learning by encouraging individual employees to invest in their own development – particularly looking at future job roles as skills requirements develop and change. Thus the proposals for Individual Learning Accounts (ILAs) are central to these developments. However, even here the same tension surfaces: the state will contribute £150 for a million learners falling into certain targeted groups; the individual will invest at least £25 plus time and effort; the employer will be "encouraged" to make further contributions. There is an asymmetry of commitment to

learning here, which is of concern not just trade unions but to all employers who *do* invest in the development of their workforce.

One frequently mentioned way to "square the circle" would be to distinguish very carefully between job-specific skills related to current employment, where the primary responsibility would be the employer's, and future-job or personal development learning, where the individual would have the primary responsibility. However, this ignores the interdependence between job-specific training and higher levels of basic and key skills (Maths, English, IT) required in modern workplaces. It also ignores the evidence from schemes such as Ford EDAP which reveal the benefits to the firm of financing educational opportunities apparently unrelated to work.

The unresolved tensions between these different views create a position in which overall movement seems problematic. The much-vaunted "consensus" on the need to develop learning individuals, organisations and society does not bear close scrutiny once questions such as "whose responsibility is this?" and "who pays?" are asked.

Nevertheless, as initiatives recorded in this report underline, there is movement at the grass-roots. It seems likely that the urgency of progress on the ground, while not resolving, may overcome some of the inconsistencies and apparent contradictions of policy. Unions have been successful in both negotiating access to education and training for their members and as direct providers of education and training. What Ufl and related developments such as Individual Learning Accounts (ILAs) and the national telephone guidance helpline (Learning Direct) offer is a fresh set of opportunities within which individual unions, supported by the TUC, can help to create a variety of ways forward for their members.

Trade unions and the Ufl

Some of the tensions within current union approaches to education and training reflect uncertainties in both workplace education and training and in plans for Ufl. This is represented in tabular form in Table 1.

Table 1 **Trade union approaches to education and training**

	'Narrow' view	'Broad' view
Workplace education and training	Skills for immediate work requirements	Transferable skills for future job roles
Trade union education and training	Lay officer training	'Working life education'
University for Industry	Ufl for workplace skills	Ufl for workplace skills, personal development and community life

These tensions are etched into the current debate about "lifelong learning" in general and the Ufl project in particular. In subsequent sections, they will be further developed and exemplified, within an overall view

that the essential "narrow" objectives can only be achieved in the context of the "broader" objectives of lifelong learning as set out in publications such as *Widening Participation: Routes to a Learning Society* (Uden, 1996).

NIACE, in particular, has warned of the dangers of creating a world of learning "haves" and "have-nots" with some people choosing to opt into the learning society and others standing obstinately outside. Part-time and temporary workers, especially those in low-skilled and low-paid occupations, are at a particular risk of being excluded from opportunities to learn.

The University for Industry (Ufl) proposals

3

Some essential background

The University for Industry (Ufl) is a government initiative to improve the skills and capabilities of people in work or hoping to join or re-join the labour force. By harnessing the potential of new information and communications technologies (ICT) and creating new private-public partnerships, Ufl plans to give more adults than ever before the opportunity to develop knowledge and skills which will enhance their employability and engagement in society and allow them to face future change with confidence.

Ufl will not be fully operational until the year 2000. Early work was done before the last general election by the Institute of Public Policy Research (IPPR) (Hillman, 1997) and is now being taken forward by the Department for Education and Employment (DfEE, 1998b). Much of the initial work was carried out by a Design and Implementation Advisory group appointed by David Blunkett and chaired by David Brown, Chairman of Motorola. This is now to be taken forward by a Transition Board headed by Lord Sainsbury.

The creation of Ufl corresponds to a new model of education and training provision in which the learner is at the heart of the system. Another part of this system is made up by Individual Learning Accounts (ILAs) which will provide funding for (initially) one million adult learners.

The Ufl *Pathfinder Prospectus*, published on 31 March 1998, lays out a programme of work for the next two years. The remainder of this section will explain the rationale behind Ufl, put the case for an inclusive view of Ufl, summarise the contents of the *Prospectus* and explain how ICT can both encourage and inhibit participation in lifelong learning. The contents of this Section 3, taken together, provide a template against which current education and training initiatives by trade unions may be assessed (Sections 4 and 5) before making positive recommendations for union involvement in Ufl in Section 6.

Naming the problems

Britain has suffered from a long-term failure to invest in the education and training of its workforce. The details are well-known and it is not the intention of this report to repeat them. While some progress was

made under previous governments in developing education and training for adults, a number of weaknesses may be noted:

- Problems were usually identified within the context of ascribing blame. Firms were "blamed" for not investing in education and training; individuals were "blamed" for their lack of interest in education and training; colleges and universities were "blamed" because the content of their courses and ways of working were seen as distant from both employers and employees. The opposition blamed the government and the government blamed previous administrations.
- Because of this failure to see the problem as a unified whole, initiatives to improve the situation were usually addressed at individual bits of the problem. A culture of short-term projects was established rather than long-term solutions with main-stream funding.
- There was over-reliance on "the market" to solve problems of supply and demand. This downplayed the obvious fact that education and training does not have "value" for either firms or employees without successful experience of investment in and application of learning, and that given the public interest in changing this negative culture to a positive learning culture, some public funding would be justified.
- There was an over-emphasis on agencies competing within a market-place rather than co-operating to the mutual advantage of employers, employees and the public good.
- Too much stress was laid on narrowly job-specific skills at the expense of building capacity and employability by improving people's basic and key skills, including such areas as IT and modern languages.
- The role of trade unions in developing workplace learning schemes was largely ignored, despite the existence of many successful initiatives, as reported in this publication.

Who are the targets for Ufi?

> ***We cannot rely on a small elite, no matter how highly educated or highly paid. Instead we need the creativity, enterprise and scholarship of all our people.***
> (David Blunkett, foreword to *The Learning Age*, 1998).

There is a strong argument that Ufi should be for everyone in the workforce or aspiring to join it, whether employed or unemployed, highly skilled or less skilled, those in the public sector and those in the private sector. Equally, given the size of the problem facing the UK economy, some prioritising is, at least in the short-term, essential. This conclusion is based on two important premises:

- Firms and individuals with most successful experience of adult education and training are the most likely to continue to invest in learning.

- Individuals and firms with least successful experience of adult education and training are the least likely to volunteer for learning (employees) or set up learning schemes (employers).

NIACE, in particular, has warned of the dangers of creating a world of learning "haves" and "have-nots" with some people choosing to opt into the learning society and others standing obstinately outside. Part-time and temporary workers, especially those in low-skilled and low-paid occupations, are at a particular risk of being excluded from opportunities to learn.

The approaches of UNISON or Ford EDAP are relevant here. They have been successful in targeting low-skilled employees who have traditionally not opted into adult education and training, and who are often those most at risk of redundancy as workplace practices and technologies change (see case studies in Sections 4 and 5).

The experiences of unions such as USDAW in the retail trade and BECTU in the multimedia industries are also significant in pointing to particular sectors in which there are structural problems which have created particular difficulties in relation to education and training. Often these are industries in which developments such as part-time work, short-term contracts and freelance work have had the most impact.

If Ufi is to be truly "for everyone", then the setting of priorities for its development and the commitment of trade unions to the development of such priorities is essential.

Ufi and ICT: access and support

Imaginative use of information and communication technologies (ICT) gives Ufi the potential to reach millions of people who have not so far participated on a regular basis in adult education and training. Such use of ICT to connect directly with groups of learners and individuals will make it easier to tie funding more closely to learners rather than to providers (colleges, private trainers, local authorities). The underlying model here is a learner-centred system which will become even more developed with the introduction of Individual Learning Accounts. The interests, needs and motivations of adult learners themselves will become a powerful driving force behind the University for Industry alongside those of employers and the economy. Ufi learners will be able to access learning materials and expertise from their own homes, at workplace Learning Centres, and in centres established in public libraries and other locations as well as in colleges or universities. In addition the sources of knowledge and instruction available will be potentially far wider than those of the colleges, universities and adult education centres accessible locally. However, in order for this to happen, learners need:

1. Access to a multimedia personal computer (PC) at home, in the workplace, or within a Learning Centre in an educational, work or community setting.

2. IT skills to use the new learning technologies. IT is thus both a priority learning area for UfI because of the widespread use of new technologies in the workplace (on the shopfloor as much as in offices) and an increasingly necessary prerequisite for other kinds of learning.
3. Support by professional educators and other learners in accessing learning opportunities, making progress and making decisions about future career and learning directions.

Here trade unions have a potentially significant contribution to make given their long experience of running courses by means of supported distance learning in which residential courses and face-to-face tutorials are combined with students working at their own pace in their own homes. During the interviews with trade union education officers which formed the basis of this publication, attention was repeatedly drawn to the significance of this human contact in ensuring success for less experienced learners.

The UfI proposals

> ***This is a new age, with unlimited opportunities for people to get on. But they face old problems – not enough time, not enough money, a complex system, a fear of learning. We need new solutions to those problems.***
> (David Blunkett, foreword to *University for Industry Pathfinder Prospectus*, 1998)

> ***The UfI will be an organisation for open and distance learning. It will have both private individuals and businesses as customers. Using modern technologies, it will broker high quality learning products and services and make them available at home, in the workplace and at learning centres countrywide. It will break down barriers to learning by making provision more flexible and accessible, by stimulating new markets to bring down costs, by offering clear, reliable information and advice, and by providing opportunities for people to learn at their own pace and in convenient locations.***
> (*University for Industry Pathfinder Prospectus*, 1998, Executive Summary)

Activities

The government's *Pathfinder Prospectus* proposes six key activities for UfI:

1. **Analyse the needs of the market and potential customers.** UfI will both use existing information on skills gaps, employment trends, attitudes to learning and the availability of learning resources, but also commission its own findings where necessary.
2. **Drive demand for learning, through mass marketing and promotion.** UfI will promote lifelong learning to the general public and to particular target groups. Individuals will be encouraged to

become UfI members.

3. **Provide people with information, advice and guidance.** UfI will eventually incorporate the national telephone guidance helpline (Learning Direct) and link with emerging local guidance networks.
4. **Ensure the availability of, and connect customers to, high quality learning programmes.** UfI will act in tandem with providers to make sure that required learning programmes are in fact available. It will also work with organisations such as employer organisations and trade unions which are able to interpret the requirements of their members. There will be a franchised network of learning centres.
5. **Commission new content.** UfI will act to plug gaps in current provision. A priority will be learning packages that can be adapted in relation to content, learning context and learning platform (e.g. web-based or broadcast).
6. **Ensure the quality of products and services.** UfI will ensure a coherent brand and identity for its services.
   The University for Industry brand will stand for quality. The brand will signify easy access to the national learning network, whether it appears above a doorway, on the television, on the back of a lottery ticket or gas bill, on a website or on a learning package in a video shop.
   (*University for Industry Pathfinder Prospectus*, 1998, p28)

Priorities

The *Prospectus* identifies initial priorities for UfI, together with indicative targets. These are:

- **Basic skills** (Within five years, an additional 200,000 people per year to undertake basic skills programmes through UfI up to level 2 of the national qualifications framework);
- **Information and communications technologies** (Within five years an additional 200,000 people per year to undertake programmes for ICT skills through the UfI at levels 1, 2 or 3);
- **Small and medium-sized businesses** (Within five years, the delivery of UfI programmes and services to 100,000 start-up businesses and 50,000 established SMEs per year);
- **Specific sectors**
  1. *automotive components* (Within two years, the delivery of UfI programmes and services to 700 companies);
  2. *multimedia industry* (Within two years, the delivery of UfI programmes and services to 500 companies);
  3. *environmental technology and services* (Within two years, the delivery of UfI programmes and services to 500 companies);
- **Distributive and retail trades** (Within two years, the delivery of UfI programmes and services to 35,000 companies).

The extent and scope of UfI activities within each of these sectoral development areas will depend on their particular circumstances and skill

> *needs. Activities might include encouraging benchmarking of performance and identification of skill needs, provision of information and advice services, evaluation and selection of materials and programmes, the development of learning networks including learning centres, brokerage between customers and providers, and commissioning or licensing of multimedia learning materials. Whilst identified skill needs will be primarily business-driven and will consequently vary from sector to sector, it is expected that key skills and level 3 skills will be important priorities for all four selected industries.*
> (*University for Industry Pathfinder Prospectus*, 1998, p21)

In all cases there will be a dual focus on individual employability and business competitiveness.

Funding for UfI

The government has accepted the case for public funding of UfI, especially in the development stages. This will taper as UfI begins to generate income from its activities. Funding is being drawn from several sources, most significantly via European Union funds which will be available in the development phase through the ADAPT programme and European Social Fund Objective Four. Other funding sources for the development of a UfI infrastructure include the Skills Challenge budget and the Further Education Funding Council. Individual Learning Accounts (ILAs) are also likely to be an important revenue stream as UfI-badged learning competes with other provision for the £150m which government will make available to fund the first million ILAs.

Timescale

Key development milestones, as set out in the *Pathfinder Prospectus* are:

1998	
Spring	*Pathfinder Prospectus* issued Transition team established Call for applications for ADAPT funding
Summer	Successful ADAPT projects announced First UfI learning products commissioned
Autumn	Chief Executive appointed UfI legal entity established Development projects running
Winter	UfI website established
1999	
Spring	Franchised network of learning centres established Databases and infrastructure established National marketing campaign begins
Summer	Full UfI staff team in post
2000	UfI open for business

4

Negotiating skills

This section outlines some of the different ways in which the TUC and affiliated trade unions are involved in negotiating for skills at the workplace. It will suggest how these can form a springboard from which unions can inform, influence and contribute to the development of UfI. It considers in turn:

- Different aspects of the skills agenda
- Motivation, guidance and learning
- Negotiating for learning in the context of changing working practices
- Priorities for trade unions.

The skills agenda

Occupationally-specific skills

Traditionally, many UK unions have been cautious about involvement in the direct provision of vocationally-specific training, believing that responsibility for equipping workers with the skills and knowledge required to perform their jobs should rest with employers. More recently, many trade unions have viewed training as a priority for collective bargaining, believing that greater involvement in local initiatives can trigger more and better opportunities for members' learning.

The TUC has actively promoted the role of trade unions as negotiators for training, through Bargaining for Skills projects and other programmes.

TUC Bargaining for Skills (BfS)

Bargaining for Skills operates in 60 TEC areas to raise awareness about lifelong learning, both among union representatives and among the TECs which are the major vehicles of government lifelong learning policy. During 1996/97, more than 3,500 lay representatives and over 500 officers attended briefing sessions on issues such as Investors in People, Modern Apprenticeships and S/NVQs. An outstanding example of what BfS can achieve is the setting up of a Learning Centre at BICC Cables in Blackley. Ken Lowe, senior GMB representative at the site, said: 'We continue to see more people becoming interested in learning which in turn gives them more confidence in themselves and their abilities. The site

benefits as more people contribute ideas and solutions to business issues.'

With the new government there have been some changes of emphasis in BfS, with the University for Industry and Individual Learning Accounts prominent. There is potential for trade union representatives to perform a key role in encouraging workplace learning, helping members to negotiate the maze of learning opportunities and supporting them in their learning projects, a central point further explored in the guidance project conducted by the TUC and the National Institute for Careers Guidance and Counselling. Bargaining for Skills overlaps with other TUC agendas around recruitment, membership and recognition. In the South West, for example, only 30% of the workforce are in union membership, and there are large numbers of small firms. Projects under discussion by BfS in the South West include new technology courses for print workers facing redundancy as digital technology comes on stream, the use of TEC sponsorship to extend TUC courses (including IT training) to the wider membership, and support for UNISON Return to Learn through existing TEC lifelong learning strategies.

John Fisher of the Transport and General Workers' Union (T&G) emphasises that BfS shows the merits of locally negotiated solutions, which do not rely on approval from above. This has important implications for the success of the UfI project.

Negotiating issues in relation to UfI are likely to include:

- representation on UfI regional and local management or consultative groups, together with UfI Learning Centre management or consultative groups, where applicable;
- adequate release for training during working time as well as access to materials and facilities in workers' own time;
- monitoring the use of funding mechanisms such as Individual Learning Accounts to make sure that firms do not substitute public and employee funds for their own investments in training;
- ensuring that participation in UfI includes all grades of employees, including part-time and temporary workers, and low-skill staff.

IT and other transferable skills

The opportunity to develop IT skills has proved to be a powerful force in motivating many adults back into learning and is likely to be among the strongest "selling points" of a "UfI curriculum". In addition, the effective use of new information and communications technologies to complement more traditional methods of teaching and learning will be an important feature of UfI programmes.

Many of the approaches likely to be adopted are already being tested both in the work of the TUC National Education Centre and by some individual unions. Other unions have yet to exploit fully the potential of new technology for member education. Local learning centres based in companies often use multimedia instructional materials and execu-

tives are increasingly familiar with PC-based communication through e-mail, chat, mailgroups, telephony and video conferencing. As access to IT and familiarity with its applications grows, especially among new entrants to the labour force, unions risk being perceived as being left behind if they too do not use the technologies familiar not only in the boardroom but also the classroom.

Unions have much more highly developed expertise in more traditional approaches to teaching transferable skills – including the development of distance learning materials such as the GPMU's print and video training package "Representing your Members". That knowledge is particularly strong in the development of materials and courses in the communication skills required for such tasks as negotiation, public speaking and encouraging active participation in democratic society. Ufl presents an opportunity for unions to market this body of materials to wider communities.

The personal development agenda

Investing in learning for individuals' personal development might not appear to be a high priority for Ufl – but specialists in the education and training of adults argue that job-specific training and academic education are of limited effectiveness if people are not ready to learn and do not have confidence in their ability to learn. There are still many adults who have had little experience of formal learning since leaving school and who found their education boring or miserable. The experience of employee development schemes (EDS) suggests that many such people can be re-introduced to learning and can discover new potential and new abilities if they are first offered a choice of learning opportunities for their personal development – often with their workmates and at times and in places convenient for their work patterns.

Ford EDAP

Ford EDAP is not only the longest established and best known of all EDS in the UK, but also contains a number of exemplary points for trade unions:

- *It is a joint management/trade union initiative at all levels, based on a tripartite management structure of Ford management, salaried unions and hourly paid unions;*
- *It has brought into education and training many manual employees who were previously reluctant to take part in either education for their own personal development or training for company requirements;*
- *It involves partnerships with a wide range of agencies, including colleges, universities, TECs, and the Basic Skills Agency;*
- *It has a number of Learning Centres which facilitate the provision of courses on-site which fit in with complex shift patterns;*
- *It makes extensive use of independent advice and guidance workers.*

Ford EDAP points the way forward in terms of both union-management partnership and the importance of offering employees a broad range of learning opportunities.

"Learning to learn" is a skill in itself – and learning "leaks" as the skills and knowledge gained in one context may be applied in other, unanticipated, contexts. Learning is also "infectious" in that each episode not only makes it easier for a person to take further steps, but also acts as an example for their work colleagues and family. For these reasons, personal development will be an important component of a Ufl which seeks to reach out beyond those who have traditionally benefited from workplace related learning and extends opportunity to those who have had least education or training. Many unions have a long tradition of promoting pathways to future learning through employee development programmes. Ufl will give this work a new momentum.

Motivation, guidance and learning

An important part of the process of employees becoming "career-resilient" is the access they have to impartial information, advice and guidance about careers and learning opportunities. Given the confidence that union members have in their representatives and the legitimacy those representatives can offer to well thought-out workplace learning schemes, the presence in a workplace of union representatives able and willing to talk to members about learning can have a key motivating influence.

While in-depth careers guidance is provided by a number of agencies, including the Careers Service and local guidance networks supporting the national Learning Direct service, there is an important role to be played by "front-line" providers of information and advice in education and training providers and in the workplace. This is particularly so for adults aged between 25 and 54. Participation studies by Sargant *et al* (1997) show that while large proportions of young adults use careers services and further and higher education institutions as their sources of information about learning, the workplace/employer is the dominant source for adults up to the age of 55. After this age friends and family are a more likely source. Employees need a variety of forms of help:

- Accurate information about providers and opportunities;
- Referral to more in-depth guidance agencies;
- Advice as to how to use available information and to relate it to individual circumstances;
- Support in "taking the plunge" in the unfamiliar world of education and training;
- Someone to negotiate with providers over the circumstances and requirements of individuals and groups of employees such as shift-workers;
- Someone to tell providers about unmet requirements.

A joint project between the TUC and the National Institute for Careers Education and Counselling (NICEC) has shown that union representa-

tives and other employees can, with training and support, carry out these roles. Often this is part of broader approaches to education and training, as at Premier Brands on Merseyside. Here the North West Bargaining for Skills project has spawned a company Learning Centre as well as guidance by trained union representatives and employee volunteers.

Training for front-line guidance roles

Training needs to be tailored to meet differing but complementary objectives, including:

- *raising awareness of the issues and processes involved in lifelong learning and guidance, including the procedures involved in NVQ assessment and accreditation* (awareness raising is arguably the majority requirement);
- *advocacy and negotiation specific to lifelong learning and guidance* (mainly for convenors and shop stewards);
- *training in front-line information, advice and guidance, including an understanding of personal boundaries, when to refer, and local helping networks* (for volunteer representatives and employees).

(*Trade unions and lifelong guidance*, NICEC/TUC Briefing, 1998)

Negotiating for learning in the new world of work

The nature of the UK economy, its workforce and how people work within it are changing rapidly. Learning is seen increasingly as the tool which allows individuals, their unions and their employers to manage and cope with massive changes – some of which are increasingly beyond the control of national governments. Within the UK these changes include:

- ***Part-time, temporary and freelance work becoming increasingly common***

This is likely to be a long-term and growing feature of at least some parts of the labour force. The much-vaunted "flexible" labour force presents a particular set of challenges to trade unions.

"There are three times as many musicians as miners affiliated [to the TUC] and twice as many university and college lecturers as iron and steel workers. We have seen that while the economy has been expanding, the workforce is becoming increasingly part-time and increasingly female."
(Roger Lyons, MSF)

"How can we organise or communicate with workers employed in agencies if we only every rely on a method of communication which sends the message via the branch or the shop steward? The vast majority of agency workers have no relationship with trade union structure in the workplace but they are a growing sector of the workforce and they need a union as much as any other workers."
(Margaret Prosser, T&G)

The challenge of organising within a sector where freelancing is increasingly the norm is one faced by BECTU:

> *"As many as 60% of workers in industries organised by BECTU may be on freelance contracts."*
> (Roy Lockett, BECTU)

Broadcasting, Entertainment, Cinematographic and Theatre Union (BECTU)

BECTU is an innovative union: it has to be in order to survive. Large employers such as the BBC and ITV companies are cutting their full-time staffs, and more and more employees now work on a freelance basis. The industry is technologically very dynamic but it is difficult to generate resources for training. 'If you don't train people to come in and fill the black holes, you're not going to have a skilled workforce in the future', says Deputy General Secretary Roy Lockett. The union's main contribution has been via Skillset, the National Training Organisation (NTO) for the broadcast, film, video and multimedia industry, which seeks to link labour market research and intelligence to the provision of training. Roy Lockett is one of its seven directors. They have created a framework of S/NVQs for the industry, in itself a major achievement in changing attitudes in an industry traditionally "qualification-free". Another Skillset achievement has been to generate funds from large employers (and a voluntary levy on independent producers) to finance both initial training and skills updating courses. BECTU's role in all this is crucial, as the only organisation that has the "large picture", is in regular contact with freelance workers and can speak for their interests in matters of education and training.

- ***Jobs using new information and communications technologies are growing in number and importance***

As well as forming a growing industrial/commercial sector in its own right, information and communications technologies impact on jobs in almost all other sectors. For example, many "unskilled" workers operate sophisticated computer equipment and manipulate data.

> *"We could see what new technology was going to mean to our factory a few years ahead and wanted to anticipate change. We were concerned that if there were going to be any jobs lost, our people might not be employable because they were intimidated by the new technology and didn't have any familiarity with it."*
> (Richie James, T&G Convenor, Premier Brands)

The next challenge is to move people from being "application literate" (competent in using a particular programme) to developing the transferable skills that make learners genuinely computer literate and therefore more employable in the longer term.

- ***Globalisation means that capital and jobs move from country to country more freely than ever before***

"De-manning in the steel industry is a Europe-wide phenomenon. The opening of steel plants by the countries of the South affects us directly."
(Tony Myhill, ISTC)

"People use the word 'flexibility' too uncritically – it often seems associated with a 'hire and fire' mentality. The broad issue is whether you can have a flexible labour force that is also highly trained. There's a concern that employers will concentrate on their core labour force."
(Steve Pickering, Deputy General Secretary, GMB)

Reviewing priorities

The changing context affects how unions approach the whole business of organising and negotiating – but it has particular implications for how they think about learning and how they can approach Ufl. Furthermore, the policy climate is such that trade unions will be pushing at an open door if they wish to play a more active role in developing lifelong learning for all: government and European Union policy is now firmly in favour of widening participation in lifelong learning both for reasons of maintaining social cohesion and so that people are not left behind by technological and social change.

Union-backed initiatives can play an important part in bringing about change – firstly because of the confidence that members have in their union and secondly because of the role unions have in bringing about the development of an inclusive learning culture within every part of a workplace. Individual trade unions will pursue their interest in Ufl as just one strand in their lifelong learning strategy, and for some unions it will be a higher priority than for others. Nevertheless, Ufl represents an additional opportunity for unions to use for the advantage of their members.

The role of trade unions

Ufl provides the opportunity for unions to review priorities for a less predictable future where a single "job for life" or an unbroken linear career is a realistic prospect for fewer and fewer people in the workforce. This is prompting more and more unions to explore new ways to represent and serve their members' socio-economic needs. This can happen through new applications of mutualist principles or as a natural extension of collective bargaining arrangements. Although traditional collective bargaining in the workplace remains a central function of a union, using collective strengths to provide wider benefits to members as individuals is growing in importance.

"As a union we've had to re-orientate what we were offering to members. In general this means a little less emphasis on collectivism and more on what

individual members want and expect from us as a result of changing employment patterns, changing employer attitudes to training, and our aim to more precisely support our members."
(Celia Pillay, EMA)

In the same way, more unions are recognising that providing or supporting learning opportunities for the mass of members – whether for personal development or to enhance their employability – is a benefit which encourages identification with the union and perceptions of relevance and value by offering the possibility of greater employment security in a changing world.

Instead of workers being "career dependent" on their employers, they can, with the help of their unions, become more "career-resilient" – both individually and collectively – by extending and updating their skills, knowledge and confidence as learners.

Change affects businesses just as much as unions. More and more organisations are realising that their security and prosperity depend upon the skills, qualities and creativity of the whole of their workforce rather than simply a privileged elite. Businesses' ability to react to – and survive – changes in market demand depends upon a workforce which is able and ready to learn and to change. This goes beyond Investors in People and means recognising that the attitudes and capabilities of those who have had little or no training matter as much as those of managers and highly skilled workers.

5 Trade unions and the provision of lifelong learning

"Recent 'distance-learning' initiatives and membership education have purposively moved away from a conception of trade union education dominated by a collective bargaining agenda. While a labour market and unemployment related context provides the backdrop for the learning outcomes, the immediate objectives are driven by wider social, political and educational priorities. Issues of inequality, of democratisation and of learning progression, for example, are evident as strong themes in the provision."
(Keith Forrester, (1995), p179).

While the previous section describes trade unions negotiating for more and better education and training for their members, this section emphasises the many ways in which they make direct provision for the learning of those members. The stress here is on new innovative developments which have clear lessons for Ufl rather than the "bread-and-butter" questions of training for trade union representatives and officials.

Unions as promoters of learning

Unions have a crucial role as ambassadors for adult learning which Ufl should not ignore. Although Ufl will include a national helpline for guidance (operating already as "Learning Direct") and broadcasting support, this will be of limited effectiveness without support for learners at local level – particularly if they are taking their first steps in formal education and training. Although the expertise of company training and personnel staff is valuable, the support of union stewards or convenors is equally important.

Union members generally trust and respect their workplace representatives in a different way from their employer or from education and training professionals. The union is perceived as having their interests at heart. Because of this, the local endorsement of Ufl by stewards or convenors in the workplace will be significant in allaying any suspicions that its prime purpose is to promote the employers' skills agenda more than help employees, both individually and collectively, to find greater security and opportunity for personal development through learning. Unions can show that Ufl is a "win:win" game.

Local union representatives in the workplace may also have a closer and more intimate understanding of individuals' circumstances, ambitions and capabilities than others. They can then offer appropriate support to people as learners or direct them to other services.

While local and workplace representatives are the most visible "ambassadors for learning", the importance of regional and national officials is also crucial in providing the support, back-up and information needed for an effective service to be provided.

Employability

According to the Basic Skills Agency, one-in-five employees have problems with basic skills – English (as a first or second language) and Maths. In an economy where low-skill jobs are disappearing, this places a question-mark over their chances of getting and keeping a job. This problem has been recognised for many years, and trade unions have been in the forefront of the response. The NUPE Basic Skills project dates from the late 1970s and has stressed a response which emphasises the importance of building personal confidence. The Return to Learn programme developed by the same union (now UNISON) uses a combination of distance learning and face-to-face methods. In a number of areas it has secured TEC and employer support and funding. As part of the UNISON Open College, Return to Learn provides a progression route from basic skills to other areas of learning.

UNISON Return to Learn and Open College

"Return to Learn is the open learning education project that UNISON offers as a service to members. Its principal purpose is to provide members of the union with stimulating opportunities for personal development. A major benefit is the creation of opportunities for members to progress through other forms of adult and continuing education and to enhance their career prospects. It also helps individuals increase their skills and confidence enabling them to play a greater role in their own communities, UNISON and the wider labour movement."

(Jim Sutherland, UNISON Director of Education and Training)

UNISON has worked in partnership with the TEC and Health Authority in Kent to get people thinking about how work is changing and what kind of skills people need to stay employable. At Lambeth Health Care NHS Trust, an award-winning union-management partnership enabled both employees and the unemployed to have access to a Learning Centre, computers and open learning materials, with the kind of support and encouragement which is vital to people returning to learning after long periods away from it.

Representative training and membership education

Representative training has been the bread-and-butter of trade union education:

> *One of the most significant contributions by unions and the TUC to workplace learning has been trade union education programmes. The courses help union members to acquire the skills to act as effective representatives and provide pathways to further learning in FE and HE. The TUC Education Service delivers training for an estimated 30,000 representatives each year on day release and short courses. Accreditation is provided by the National Open College Network for shop stewards and S/NVQs for trade union officers through the TUC's National Education Centre.*
> (Sarah Perman, TUC Policy Officer in *Adults Learning*, Volume 9, number 8, April 1998)

It is a characteristic of the "learning age", however, that boundaries become blurred. This happens in three characteristic ways:

- **The purposes of education and training:** both the TUC and its affiliates run IT courses. These courses help representatives to do their trade union work more effectively. But they also enable participants to respond to changing technologies in the workplace, to keep up with children who are using IT at school from the age of 4, and so on.

- **Education and training for organisation and recruitment:** another blurring of boundaries occurs between education and training as an organisational issue – the need to have knowledgeable and effective workplace representatives – and as a recruitment and membership issue – new members are captured and retained by the educational opportunities that unions are increasingly able to offer.

- **Control of education and training:** the TUC and affiliates have controlled the content of trade union education and training. The question for the future is to what extent UfI prompts more sharing or negotiation with other agencies such as national training organisations, employers, further and higher education institutions or qualification awarding bodies.

A number of unions are now involved in learning schemes which seek to use the experience of representative training (and the credit achieved through Open College accreditation) to link into broader types of education and training. Getting Started with MSF is an example of a course which provides an alternative starting-point for a wider membership education offer.

Getting Started with MSF

Most MSF courses are for union activists. Getting Started with MSF is a

distance learning course for all members which looks at the work of trade unions in the context of rapid social and economic change. It was targeted specifically at those members who were either new or were inactive and has been developed in conjunction with the School of Continuing Education at the University of Leeds, which also accredits MSF's broad programme of representative training.

Getting Started with MSF consists of six modules:

- *The origins and nature of trade unions*
- *Trade unionism into the 21st century*
- *Trade unions, democracy and the wider society*
- *Trade unions and the law*
- *MSF in action*
- *What next?*

The course attracts a considerable proportion of already well educated members but with its stress on confidence-building and learning skills, it also encourages wider participation by less well educated members. Students are in control of the pace of learning: four months is recommended for each module, giving a total of two years for the whole course, but it is possible to complete it much more quickly. The course is free to MSF members.

Accreditation for this course is optional (and has to be paid for), but opens the way to a wider programme of University of Leeds distance learning modules, which are currently at the development stage. These courses will include modules on Learning Skills and Career Development as well as more specialised trade union studies and social science courses. Eventually it will be possible to move from either representative training courses or the Getting Started course to a full Social Science degree from the University of Leeds at very little cost to the member.

'It is increasingly true that people are not going to have careers for life, and that the new job security is not a career for life but is transportable skills, and that they are analytical, knowledge-based skills that people need.'
(Sarah Howard, MSF National Education Officer)

It is particularly significant how many of these recent trade union initiatives involve elements of open and distance learning and thus have particular relevance for UfI. Courses such as Getting Started with MSF or UNISON Return to Learn have built up considerable expertise both in using modern learning technologies to facilitate access to learning, and also in providing less confident learners with the necessary support and back-up to make a success of their learning.

Lifelong learning for trade union members

At national level, unions' own learning initiatives contribute to the promotion of a lifelong learning culture embracing UfI. That is to say that UfI will both provide additional opportunities for trade union members and also that the approaches pioneered by trade unions offer successful models for UfI practice. Furthermore, UfI could provide opportunities

for marketing and promoting union-developed learning packages or programmes.

The PCS, for example, is launching (May 1998) a "Learning through Life Foundation" to offer a range of opportunities from advice and guidance and basic skills through to professional development.

The Learning through Life Foundation

The Public and Commercial Services Union (PCS) is a young union, formed in January 1998 by the merger of two civil service unions, PTC and CPSA. The Learning through Life Foundation has grown from a 1997 study into the full range of benefits provided for members. It is an ambitious project which will operate at a number of priority levels:

- *Signposting: advice, guidance and career development*
- *Baseline: basic skills including IT*
- *Portfolio: taking responsibility for your own learning*
- *Panorama: professional development.*

The Foundation parallels UfI in operating as an enabler rather than direct provider: 'Whilst each programme is concerned with securing provision for those in the civil, public and allied services, the organisation will not necessarily provide directly that provision. In most of its work it will be an enabler rather than a provider. It will liaise, co-ordinate and commission while taking to itself only those areas of work for which there is no appropriate body.' (1997 PTC report, The Shape of Things to Come*)*

Learning through Life is entering into partnerships with colleges, TECs, private training organisations and the TUC Bargaining for Skills project to provide particular learning programmes.

In the private sector, BIFU has developed innovative projects in two of the new financial processing centres in London. These stress Information Technology and the learning needs of people who are vulnerable to future changes in the technologies used by the financial industries. Barriers to their learning include shift-work and the part-time status of a number of the employees. A partnership has been forged with the University of East London to provide the courses. Such partnerships between unions, employers and education and training providers show a way forward for UfI.

Meeting specialist demands

Trade unions, like their members, come in various shapes and forms. The same union may represent unskilled and highly skilled workers and want to address the education and training needs of both. A union such as the Engineers' and Managers' Association (EMA) represents relatively highly skilled people. In recent years it has responded to three related challenges:

- Changing employment patterns, and the disappearance of "cradle to grave" jobs for its members.

- Changing attitudes to training. Personal career development and business training are no longer identical, and individuals have to take more responsibility for their own career development.
- Since the aim of the union is to support its members, career development is a priority for the union as well as for its members.

EMA has set up a separate company (EMAT) to design and market professional development courses for its members.

EMA Training Ltd (EMAT): Open University MBA

The Engineers' and Managers' Association (EMA) is the majority shareholder in EMAT. Most of its members are scientists and engineers and progression means essentially going into management. EMAT has built on successful experience by their Australian sister union to develop an MBA in Technology Management with the Open University. The fee structure favours members while not excluding non-members. Support is provided through an introductory weekend and the OU tutor while a web-site conferencing facility is planned. Employer contributions can include part or whole payment of fees, use of workplace ICT facilities for study, and use of company Learning Centres. Further developments are planned at certificate and diploma level.

Learning Centres

A national network of Learning Centres is central to the Ufl vision. These are intended to offer facilities that might not be available in learners' homes or in smaller workplaces. While Centres may be in colleges and universities, the intention is that they should also be based in libraries, larger work places or entirely new locations.

Increasing numbers of businesses are establishing company Learning Centres and some even run their own "quasi-universities" offering degree programmes developed in partnership with higher education institutions. Trade union involvement in the management and development of such centres has led to a range of initiatives which encourage higher levels of use and a wider range of employees accessing learning. In some cases this extends to employees' families or unemployed people in the community.

There is also a long tradition within the trade union movement of individual unions running their own independent education centres, usually with residential accommodation. The majority of the courses are for union representatives, although there is some provision for the wider membership. The TUC itself runs a National Education Centre in North London which concentrates on courses for full-time trade union officials. Within colleges, trade union studies centres provide training courses for union representatives at a local level, and also act as an important point of access to broader education and training opportunities for members and their families.

There are opportunities for unions to promote and build upon local

initiatives which can act as exemplars for UfI. Examples of such work include:

- An on-site "cybercafé" at Dagenham within a well-equipped learning centre as a result of the EDAP employee development scheme run by the Ford Motor Company and the nine unions representing its workforce.
- In Lincoln, the AEEU is a partner with the local council, the local TEC and a local college and the major local employer (Euro Gas Turbines) in the development of a new engineering training facility for the city and its travel to work area.
- On the Wirral, the TGWU branch at Premier Brands is establishing a "bag of crisps levy" (25p per person per week) to finance further development of an on-site IT-based learning centre established in partnership with the company and a local college.
- At Lambeth Healthcare Trust and at Vauxhall's Luton plant, local learning centres are being opened up to unemployed people from the local community.

What all these initiatives recognise is the diversity of members' needs, experience and expectations and also their need to have some kind of ownership at local level of the learning processes and practices.

> *There are clearly lessons for UfI about the nature of successful partnerships and how best to motivate people to participate. UfI must not get trapped into only targeting individuals – people need to be reached through the groups and communities with which they identify.*
> (John Lloyd, AEEU)

6 The trade union role in UfI

The purpose of this section is to explore some of the possibilities for trade unions wishing to incorporate the development of UfI into their strategies for lifetime learning. It outlines one approach through which unions and employers might work together; sets out four over-arching challenges for unions and four more for everyone concerned with the development of UfI. It then proposes an agenda for the TUC and trade unions.

Trade unions and lifelong learning

Just before the publication of *The Learning Age*, (the green paper on lifelong learning), a far-reaching report was submitted to the National Advisory Group for Continuing Education and Lifelong Learning (NAGCELL). The report of the Workforce Learning Task Group, chaired by Jim Sutherland of UNISON, develops ideas explored in *Learning for the 21st Century* (NAGCELL, 1997) but places a specific emphasis on the role of trade unions. It suggests that three types of learning are important in the workplace:

> **Task specific or job-related learning** – *which should be designed to improve the competence, efficiency and productivity of the workforce within their current occupations;*
>
> **Parallel and transferable skills learning** – *which should be designed to create a more flexible workforce, responsive to the changing nature, or short-term staffing needs, of a particular employer;*
>
> **Personal development learning** – *which should be designed to provide the knowledge, skills and competence necessary to enable individuals to make employment and career changes not limited to progression within their present employment and to create opportunities for personal fulfilment.* (Sutherland Report, p6)

The report also suggests a "minimalist legislative framework" to address some of the problems outlined in Section 2 of this report, at least for larger firms. It recommends an approach similar to that of the 1974 Health and Safety at Work Act with two principal components:

1. A requirement that employers produce policy statements setting out a commitment to workplace learning and an indication of how lifelong learning objectives are to be achieved in the firm.
2. Learning committees with equal management and union representation to monitor progress towards the objectives.

From this process, Learning Agreements would emerge setting out rights and responsibilities in relation to lifelong learning for both employers and employees.

Ufi and the challenges for trade unions

The framework proposed above could be a mechanism for trade unions and employers to discuss the implementation of Ufi in the workplace. In so doing, Ufi presents four over-arching challenges for trade unions. These are:

1. To shape an agenda for Ufi at every level which stresses **inclusiveness, diversity** and **co-ownership** of learning by learners and which promotes a broad vision of the new initiative.
   "Ufi should make a serious contribution to securing a participative democracy. What follows is that it must be as concerned with cultural wealth as it is with economic health".
   (Jim Sutherland, UNISON)

2. To ensure that the Ufi contributes to the competitiveness of organisations and of the UK economy by **helping workers to increase and broaden their skills**.
   "We lag behind the rest of the OECD countries in terms of skills. So Ufi is obviously crucial to economic performance as well as addressing issues of social exclusion."
   (Sarah Howard, MSF)

3. To ensure that **best** practice in union-led education and training becomes **common** practice.
   "Ufi will not succeed as a mechanism for controlling development. It needs to promote participation and support innovative expansion"
   (John Fisher, T&G)

4. To ensure that the TUC and its affiliated unions retain control over their education and training activities, while also entering into constructive **partnerships** with other partners (employers, colleges, university, government).
   "They will need to give away some of the ownership – that will convince people and get them to carry the ideas forward."
   (Richie James, T&G Convenor)

The challenges for Ufi

A broad approach

The challenge for Ufi is to balance different parts of its brief, in particular

- raising skill levels
- increasing participation
- combating social exclusion.

With limited budgets and the need to draw in private sector finance, it has to consider how best to include the "harder to reach" groups of learners – those in part-time and temporary employment as well as those in declining occupations and those in low-skill jobs in industries with no traditions of training. Unless it is successful in this, it risks ending up as simply another "high-tech" opportunity for those who have already benefited most from learning.

> *"Ufi should not be just about narrow vocational training, which is going on at any rate. It's about understanding what is going on and allowing people and groups to position themselves so that they can continue to contribute rather than be damaged – allowing them to be active rather than passive."*
> (Pauline Ortiz, BIFU)

Inclusion

The nature of work is changing and if Ufi is to offer more than existing education and training initiatives, it must be designed from the start to reflect the needs of the future, not the past. Trade unionists and educators consulted by the authors of this publication were unanimous that Ufi should have an inclusive vision, offering something of value to part-time workers, shift workers and to those who are generally excluded from company-led learning. If this is possible, those interviewed offered their enthusiastic support.

Collective and individual agendas

> *"Ufi must not get trapped into only targeting individuals – people need to be reached through the groups and communities with which they identify."*
> (John Lloyd, AEEU)

While Ufi will need to work with employers and their organisations, it should not ignore the opportunities trade unions provide to reach groups of learners in effective and economical ways. Although both unions and employers have a shared interest in a better educated and trained workforce, their needs and priorities differ and if Ufi becomes over-identified with an individual agenda, its effectiveness will be weakened.

Independent but accountable.

The legal status of Ufl has yet to be determined and thus its "ownership" is presently unclear. Advertisements have appeared for a Chief Executive and a Transition Board, chaired by Lord Sainsbury is being established. The challenge will be to give Ufl independence from any existing sectional interest in education or industrial training but to make it properly accountable and responsive to the needs of learners. Trade unionists consulted were keen that the Ufl Board should be inclusive of as many interests as possible. Concern was expressed that an over-centralised, "top-down" model, imposed for reasons of economy and speed of response, would stifle desirable regional, local or sectoral diversity and flexibility and would fail to instil a sense of belonging and ownership at local level. There is a need for trade union involvement at all levels.

Ufl – a trade union agenda

As suggested in Section 4, overall negotiating issues in relation to Ufl are likely to include:

- representation on Ufl regional and local management or consultative groups, together with Ufl Learning Centre management or consultative groups, where applicable;
- proper release for training during working time;
- monitoring the use of funding mechanisms such as Individual Learning Accounts to make sure that firms do not substitute public and employee funds for their own investments in training;
- ensuring that participation in Ufl includes all grades of employees, including part-time staff.

The role of the TUC

The groundwork done by TUC Bargaining for Skills projects in fostering local innovation is highly valued both by individual unions and partners in TEC's, colleges and universities, and by businesses. Bargaining for Skills gives the trade union movement a firm grass-roots base from which to improve, increase and extend local involvement in Ufl.

The TUC can also provide active support by publicising and promoting Ufl to union officers and members and by ensuring that union TEC directors link local strategies for training and enterprise to Ufl. The TUC should actively consider developing taster courses on how to get involved in Ufl, and the possibility of recognising and approving learning centres which meet high standards for employee and union involvement.

In addition, the TUC's own education service and the direct provision made through individual unions means that a distinctive, proven, quality-assured and accredited body of curriculum expertise is already in place which could be supported, almost in its entirety, by Ufl.

The TUC will need to develop a strong national framework to help

affiliates work with the Ufl. In 1997 it established a Learning Services Task Group to develop practical proposals for the TUC and trade unions as providers and facilitators of learning. A range of proposals are being explored to help trade unions maximise the benefits of Ufl.

Table 2 includes these proposals and other implications of Ufl development for the TUC and affiliated trade unions.

Table 2: **Ufl: A negotiating agenda**

CORE ACTIVITY PROPOSED BY PATHFINDER PROSPECTUS	"SHORTHAND FUNCTION"	IMPLICATIONS FOR THE TUC AND TRADE UNIONS	IMPLICATIONS FOR TRADE UNION NEGOTIATING AGENDAS
1. Analysis of the needs of the market and potential customers, including skill gaps; trends in employment, technology and the economy; attitudes towards learning; and the extent to which suitable resources are available	"Thinking ahead"	Ensure that training and education policies are reviewed regularly in the light of Ufl and other policy developments in lifelong learning	Ensure that bargaining for Ufl includes the three key types of workplace learning: • Training for current job; • Broader transferable skills for employability and future jobs; • Personal development learning Make an input into Ufl in relation to members' changing learning needs
2. Drive demand for learning through mass marketing and promotion. The Ufl will promote lifelong learning as a beneficial and enjoyable activity for people and businesses	"Selling learning generally to individuals and employers through Ufl"	Extension of TUC Bargaining for Skills to include support for Ufl and Individual Learning Accounts The training of trade union members to act as "Workplace Learning Representatives" Development of a TUC taster course on how Ufl works and how to get involved Develop lifelong learning policies as a recruitment and retention issue for unions Support pilot projects that develop the potential of individual learning accounts for members	Publicise and market Ufl to union officials, representatives and members Promote equal access and opportunity agendas both locally and nationally, to include: • (people) part time temporary and shift workers; those with disabilities • (skills) basic and key skills – English, Maths, IT, study skills Ensure proper local linkage between Ufl and Individual Learning Accounts so that the two work effectively together Secure legislative or voluntary framework for workplace lifelong learning agreements: a context for Ufl to grow and flower in the workplace

CORE ACTIVITY PROPOSED BY PATHFINDER PROSPECTUS	"SHORTHAND FUNCTION"	IMPLICATIONS FOR THE TUC AND TRADE UNIONS	IMPLICATIONS FOR TRADE UNION NEGOTIATING AGENDAS
3. Provide people with information, advice and guidance so that they can quickly pinpoint learning resources that match their individual needs. Services will include a national helpline, a database of customers' learning requirements, resource directories, a newsletter and a website	"Helping people to make choices about what to do next"	Training for trade union representatives as information and advice Ensure guidance providers at local, regional and national level (including Learning Direct helpline) are aware of opportunities provided through trade unions	Inclusion within local guidance networks of a representative familiar with trade union organisation and education and training programmes Support quality-assured standards in the training of guidance workers – whether for union representatives or employer representatives Involve union representatives in guidance training
4. Ensure the availability of, and connect customers to, high quality learning programmes that match their needs, by working with relevant agencies and by forging partnerships	"Linking learners with suitable materials and support"	Use Ufi to open a wider market for existing and future TUC and union educationand training initiatives Consideration of the development of Ufi access points in existing TUC study centres, union residential colleges, union offices and the TUC National Education Centre Explore potential of TUC on-line services linked to Ufi, building on work done by the TUC National Education Centre	Seek union involvement in management of Ufi centres and initiatives in order to reassure learners that Ufi is for individual opportunity as well as business objectives Establish "learning partnerships" to develop more and better opportunities for the education and training of members
5. Commission new content to meet gaps between existing supply and demand. This might include seedcorn investment in new technologies and approaches to training	"Filling the gaps"	TUC/affiliates could seek Ufi commissions to: •Adapt existing materials for wider audiences •Develop new materials including basic and key skills packages which meet members' needs but are also accessible to others Potential role in "endorsing" relevant learning materials developed by other providers – thus validating their quality and relevance	Monitor the quality and relevance of Ufi provision in terms of the design and delivery of learning materials. Feed this information back to providers of learning materials, employers, funding bodies Identify areas of unmet or inadequately met needs and wants
6. Ensure the quality of products and services which it brokers or commissions, building on existing mechanisms and standards	"Giving the Ufi seal of approval to materials and centres"	Identify examples of good practice in trade union education which can be generalised as part of Ufi's quality procedures Consider adopting Ufi quality standards for TUC and union learning materials and centres Consider TUC seals of approval to learning centres which meet high standards for employee and union involvement	Negotiate with employers to support quality assured learning materials and suppliers

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7

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Glossary

ADAPT	European Social Fund programme which provides funds for the adaptation of workers to industrial change
AEEU	Amalgamated Engineering and Electrical Union
BECTU	Broadcasting, Entertainment, Cinematography and Theatre Union
BfS	Bargaining for Skills: a series of Trades Union Congress/ TEC projects
BIFU	Banking, Insurance and Finance Union
DfEE	Department for Education and Employment
EDAP	Ford UK Employee Development and Assistance Programme
EDS	employee development schemes (also known as employee development programmes)
EMA	Engineers and Managers Association
EMAT	EMA Training Ltd
FE	further education
GMB	general union, with members in manufacturing and services (including public service)
GPMU	Graphical Paper and Media Union
HE	higher education
ICT	information and communications technologies
ILAs	Individual Learning Accounts
IPPR	Institute for Public Policy Research
ISTC	Iron and Steel Trades Confederation
IT	information technology
Learning Direct	national telephone guidance helpline
MSF	Manufacturing, Science, Finance
NAGCELL	National Advisory Group for Continuing Education and Lifelong Learning
NIACE	National Institute of Adult Continuing Education
NICEC	National Institute for Careers Education and Counselling
NTOs	National Training Organisations
NUPE	(see UNISON)
OU	Open University
PCS	Public and Commercial Services Union, formed 1998 by merger of PTC and CPSA
S/NVQs	Scottish Vocational Qualifications, and National Vocational Qualifications (England and Wales)
TECs	Training and Enterprise Councils (now include some Chambers of Commerce, Training and Enterprise). In Scotland, they are called Local Enterprise Companies
T&G	Transport and General Workers' Union
TUC	Trades Union Congress
UfI	University for Industry
UNISON	public sector and public sector-related workers' union, formed from amalgamation of COHSE, NALGO and NUPE
USDAW	Union of Shop, Distributive and Allied Workers
WEA	Workers' Educational Association

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